

Integrating PeopleSoft and Salesforce CRM Generates Greater Efficiency

Customer Requirements

- ▶ Merge PeopleSoft CRM with Salesforce CRM to manage its customers, partners, and employees efficiently

Customer Benefits

- ▶ The new solution helped the client reduce the development and testing timelines.
- ▶ Enabled the merged company to use the features of PeopleSoft while continue to using Salesforce.
- ▶ No user training and documentation needed thereby eliminating training costs.
- ▶ Enabled the client plan a smooth transition for ongoing maintenance post go-live.
- ▶ Consistent processes across both the businesses resulted in profitability.

Background

The client specializes in broadband network design and engineering, which acquired a major technology company. It faced the challenge of merging two businesses having disparate customized CRM systems to manage their complex business processes and clientele. The client used PeopleSoft CRM while the acquired company used Salesforce CRM to manage their customers, partners, and employees.

Besides, the client used few key support services processes which were not implemented on Salesforce CRM; such as Custom Offers, Bulk Warranty Lookup, RMA Orders etc. Implementing these on Salesforce would have had impacted the merger timelines, profitability, and budget. Both companies were using CRMs customized by their in-house teams and partners; which brought in another challenge of collaboration.

SOAIS Solution

The client partnered with the SOAIS team, which began with identifying the gaps between the two businesses' customer support processes. The SOAIS team focused on providing a cost effective solution which can meet the merger timelines and execute minimal changes in the IT infrastructure.

Considering the constraints and challenges, the team proposed Services Oriented Architecture (SOA) based solution. The SOA based solution enabled reusing the existing IT solutions and it significantly reduced the timelines by several months and saved cost. Additionally, the team exposed the PeopleSoft business logic for various key processes as SOAP based web services and these web services were consumed by Salesforce. The SOAIS team:

- ▶ Migrated the Customer base, Case Management, and Lead/Opportunity Management from the PeopleSoft to the Salesforce.
- ▶ Integrated PeopleSoft and Salesforce to introduce the missing key processes in the Salesforce.
- ▶ Customized the UI of Salesforce for migrated processes, as it is in the PeopleSoft.

About SOAIS

SOAIS is a leading enterprise IT solutions provider. With its best practices, and global collaborative workforce, it helps the business functions work faster, cheaper and better, offering a full spectrum of technology solutions in the arena of PeopleSoft, WorkSoft, SAP, Oracle Fusion, and niche technology areas such as mobility.